

**79<sup>th</sup> MAAO Educational Conference**  
**June 4<sup>th</sup> – 7<sup>th</sup> 2019**

**Tuesday June 4<sup>th</sup>, 2019**

---

5:00 pm – 6:00 pm    Registration

6:00 pm – 9:00 pm    **SESSION A: 3 CEC**

Topic:            **What You Don't Know About Personal Property and Charter**

Speaker:        **Gary Duffy, Area Supervisor, State Department of Assessments & Taxation (SDAT)**

**Maria Mathias, Program Manager, Personal Property, SDAT**

What is Personal Property and what is Real Property? Overview of the Personal Property Division (and the many changes over the last 2 years) and an overview of the Charter Division. Gary will discuss the benefits of using our Charter records to help determine if transfers between entities are arms-length or not. He will also give a short presentation on Casinos - what's real and what's personal (with pictures). Maria will discuss Tax Property Article 7-245 (Exemption for Low Assessments) and new legislation affecting Personal Property. She will also talk about a Tax Court hearing involving valuation of coal plants. A Power Point on Small and Minority Businesses and a discussion of Business Personal Property Valuation of solar and wind will be included.

**Wednesday June 5<sup>th</sup>, 2019**

---

8:00 am – 9:00 am    Registration and Continental Breakfast

9:00 am – 10:00 am    **OPENING REMARKS**

Zachary Grisard, *MAAO President*

Rick Meehan, *Mayor of Ocean City, MD*

Michael Higgs, *Director - State Department of Assessments & Taxation (SDAT)*

Charles Cluster, *State Supervisor - SDAT*

10:00 am – 12:00 pm **SESSION B: 2 CEC**

Topics: **Common Commercial Real Estate Topics from the Eyes of the Owner/Developer  
Future Commercial Topics ..... How will our Commercial World Change in the  
Future?**

Speakers: **James (Bo) Vicendese Jr., MSF and Rob Unkle, CMI, Altus Expert Services, Altus Group  
Jack Lopez, Director of Tax for Corporate Office Properties Trust (COPT)  
Jeffrey L. Marquina, CPM, Vice President, Property Management, Government Services,**

James Vicendese Jr. will coordinate a round table discussion with developers and assessors talking about their experiences. This will include a Q & A discussion about valuation and theory. The 1<sup>st</sup> half of the round table will focus on real life issues that developers/owners and the guys in the trenches face every day. The 2<sup>nd</sup> half will focus on the future, such as real estate trends and issues impacting commercial real estate.

12:00 pm – 1:00 pm **Lunch Break**

1:00 pm – 4:00 pm **SESSION C: 3 CEC**

Topic: **The Devil Is In the Details: Understanding Residential Construction**

Speaker: **George W. Lutz III, Certified Residential Appraiser  
Lutz Appraisal Associates**

This 3 hour course has been designed to assist appraisers and realtors on what to look for during property inspection with regard to quality and condition of materials, workmanship and finish that impact the overall value of the property.

**Discussion will include:**

- Basic construction methodologies that include older techniques as well as more modern materials and technology, beginning with the site plan through the various elements of the completed construction.
- How to more accurately determine differences in quality and condition, and thus differences in value between properties and their adjustments.
- What to look out for and document potential problem and defect areas found in homes.
- Numerous examples that compare and contrast will include types of adjustments that are needed to accurately complete your appraisal or CMA.
- Cost Differences as to materials and quality ratings.
- Governmental Costs and Impacts to New Construction as well as existing.

**Thursday June 6<sup>th</sup>, 2019**

---

8:00 am – 9:00 am    Registration and Continental Breakfast

9:00 am – 12:00 am    **SESSION D: 3 CEC**

Topic:            **Acquiring, and Maintaining Appraiser Competency in Mass Appraisal**  
Speaker:        **William Henry Riley III, DPA, MBA, CAE – Certified General Appraiser**  
                      *Chair of IAAO Committee on USPAP*  
                      *AQB Certified USPAP Instructor*

**Summary:** Appraisal competency is the topic of this 3- hour seminar. Hour 1 will consist of a general introduction to the concept of competency and the requirements for appraiser competency as defined in the Uniform Standards of Professional Appraisal Practice. We will review appraiser competency and the understanding of unique competency challenges faced in ad valorem mass appraisal. In hour 2, we will discuss and understand different strategies for developing and maintaining appraisal competency and competency in mass appraisal methods and techniques. At the completion of this session participants will understand the different skill types needed in mass appraisal and some strategies for developing competency in the appraisal of different property types. In hour 3, participants will view a demonstration for developing appraisal competency for a specific property type through a program of self-study. Also, participants will break into work groups and do two case studies developing certain appraisal competencies. This hour will end with the groups reporting their recommended strategy for gaining appraisal competency in each of the case studies.

12:00 pm – 1:00 pm    **Lunch Break**

1:00 pm – 4:00 pm    **SESSION E: 3 CEC**

Topic:            **Non-Conformity and its Impact on Redevelopment**  
Speakers:        **Glenn Irwin, Executive Director of the Ocean City Development Corporation (OCDC)**  
                      **Blaine Smith, President of Ocean City Development Corporation**  
                      *(Ocean City, Zoning Administrator – Retired)*

Participants will take a walking tour of Downtown Ocean City after a discussion focusing on the redevelopment process. An emphasis on existing and future non-conformity factors and their potential impact on value will be the topic of that discussion. As part of the walking tour there will be a discussion about the importance of design standards. Design standards are developed to provide consistency and to protect and/or enhance values by creating a sense of place.

Meeting Place: Ocean City Beach Patrol, Headquarters (2<sup>nd</sup> Floor, Conference Room)  
109 Talbot Street, Ocean City, MD

**Friday June 7<sup>th</sup>, 2019**

---

9:00 am – 12:00 pm **SESSION F: 3 CEC**

Topic: **Administrative Law Principles that Every Assessor Should Know**  
Speaker: **Jeffrey Comen, Principal Council, SDAT**

The presentation will be a primer on administrative law and how it dictates literally everything our agency does. Jeff will talk about how our agency was enabled, its mission, all of its controlling laws, its exercise of discretion and how it exhibits judicial, legislative and executive functions. Specifically, he will discuss the holding of assessor hearings, promulgating regulations, property inspections and information gathering, as well as other topics.

1:00 pm – Until **MAAO Annual Business Meeting**

Treasurer's Report  
Committee Reports  
Old Business  
New Business  
Installation of Officers  
Final Remarks  
Adjournment

*All Classes are pending approval by the Maryland Appraisal Commission*